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SECRET

OFFICE OF RESEARCH AND REPORTS

BRIEFING PAPER
1961

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BRIEFING PAPER

Introduction

Intensification of the Communist threat over the past year has had a major impact on the work of both our Economic and Geographic intelligence research components and in many respects has increased the urgency of these efforts.

Bloc economic developments within the past year were marked by: further rapid growth of Soviet industrial and military power; continued lack of progress in Soviet agriculture; more difficult decisions for the Soviet leadership in its allocation of economic resources among military, civilian, agricultural, industrial and foreign claimants; serious economic difficulties in Communist China; a worsening of Sino-Soviet economic relations; and by expansion of the economic and political offensive in underdeveloped areas.

In today's world, the long-run balance of national power depends on economic capabilities, on the goals to which economic resources are directed, and on relative economic growth. The gravity of the Communist threat in these three critical areas cannot be dismissed. It follows that reliable and object intelligence on the Communist economies -- their strengths and weaknesses, their problems, intentions and prospects -- must be available to those responsible for

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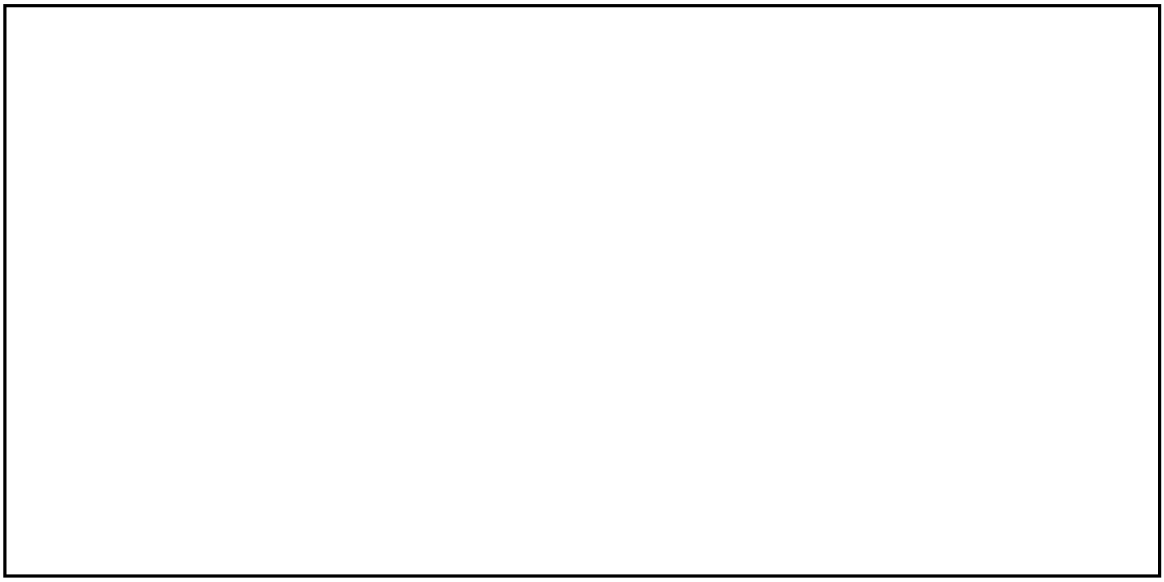
shaping the U.S. reaction to the threat. By interagency agreement and by DCI directive our Office of Research and Reports has the primary responsibility for providing such economic intelligence support.

Our geographic research effort is world-wide in scope. During 1961 the advent of new crises or escalation of long-standing Communist pressures in Asia, Africa, and Latin America has called for a number of shifts in the direction of



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Economic Intelligence

October 1961 saw the announcement of the Communist Party's twenty year program setting forth the guidelines for Soviet economic development to 1980. The program presented by Khrushchev at the Party Congress is in the first instance a political document intended for internal and external propaganda effect with a sidelong glance at the underdeveloped countries of the world. The economic portion of the program, though it contains many concrete goals, is incomplete, inconsistent and vague in many parts, and hedged by contingency reservations at key points. In spite of these deficiencies, the statements regarding industry must be regarded as a fundamental policy statement of the Communist party. The political objective of carrying on the world-wide conflict of communism versus capitalism (or any other competing system) to ultimate and complete victory of the former is clearly and emphatically stated. A key question is whether certain economic features of the program, particularly its promises to the consumer, involve commitments which would substantially limit the ability of the leadership to direct the resources of the USSR to accomplish its long-run power objective. Our present judgment is that these promises imply a rising level of living, but, as in the recent past, a much more rapidly rising volume of investment and corresponding growth in heavy industry. The consumer promises are, if anything, a little less concrete,

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and the goals a little less imminent than those which have been publicly discussed over the past few years.

Close analysis of an expanding volume of published statistical material, policy discussions, and official statements facilitates measurement and anticipation of the problems of the complex Soviet industrial structure. Structural shifts in the Soviet economy, occasioned by problems in the expansion of the raw material and energy base, by the decision to channel more investment into housing and agriculture, and by the need to accelerate capital investment in machinery and equipment, particularly for the introduction of new technology and automation, are now more fully understood. This understanding is reflected in ORR's contributions to the Soviet National Intelligence Estimates which evaluate the recent and expected future developments in Soviet economic growth.

For Communist China 1961 was marked by serious economic problems. Overshadowing all other difficulties was the tight food situation. Harvests were poor for the third year in a row, and the leadership was forced to tap its dwindling foreign exchange holdings to import over five million tons of grain, mostly from Canada and Australia. Rations, already at a barely tolerable level, were cut still further. Authoriative reports reveal that malnutrition was so widespread as to affect even priority groups in Chinese society. The commune

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system became little more than a name, the control over actual agricultural operations being assigned to subordinate units -- the production brigade and the production team. Industrial production dropped at least 15 percent, primarily because malnutrition cut down the production of necessary raw materials and because of absence of Soviet technical assistance. In addition, imports of industrial machinery were cut at least 50 percent, and China used up most of its scarce reserves of foreign exchange to finance imports of grain from the Free World. The regime has not released any statistics on economic plans or performance in 1961, but a limited amount of information may be forthcoming from the National Peoples Congress, scheduled to start on 5 March. The leadership has claimed that the program of consolidation and retrenchment will be completed in 1962 and that economic growth will be resumed during the Third Five Year Plan period (1963-67).

The Office is following these events closely in its economic research program on Communist China. ORR made contributions to a series of Special National Intelligence Estimates on China, covering the current economic situation, Sino-Soviet economic relations, the economic situation as it might develop over the next decade, and the military capabilities of China.

Major reports produced in 1961 included reports on investment, taxation, and gross national product. Extensive

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research was completed on the transportation system, and a report on this area of the economy will be issued shortly.

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[redacted]

In 1961 the negative effects on the East German economy of unrealistic Communist policies and of a further intensification of the Berlin crisis raised new questions as to the stability of East Germany and its relations with both East and West. ORR intensified its effort on East Germany, by contributing to National Intelligence Estimates, evaluating East German actions to reduce vulnerability to Western economic countermeasures, and giving continuous support to current intelligence on the East German situation. Increased attention was also given to Albania, whose dispute with the USSR has led to strong Chinese Communist support and virtual exclusion from the Soviet Bloc. Basic ORR research on all the Satellites continued to be focused on the factors that could affect popular attitudes, bring about important changes in economic policy, or modify the relationships of the Satellites with the USSR in future years.

An adequate assessment of the complex and closely interrelated problems of the economies of the Sino-Soviet Bloc

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requires an integrated approach to the research effort. ORR, to meet its responsibility, must direct its intelligence activities at all levels of the economies of the Sino-Soviet Bloc in varying degrees of intensity. Our analyses have emphasized the exploration of the economic factors which will play a major role in the determination of the future course of the Bloc economies. We thus concern ourselves, not only with economic growth in the Bloc countries and the interdependence of their economies, but also with economic factors bearing on their military posture and with their use of economic measures in relations with the Free World, particularly their growing trade and aid programs directed towards the underdeveloped countries.

In our research on major military developments, significant new information acquired during the past year has confirmed our previous judgment that the USSR has deployed an imposing force of operational medium-range ballistic missiles (MRBM's) capable of attacking major military and civilian targets in Western Europe, Africa, and the Middle and Far East. The bulk of these missiles are deployed in the Western USSR and probably account for Khrushchev's references during the year to Western Europe as his "hostage". Evidence with respect to the Soviet ICBM program is sufficient for us to conclude with relatively

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high confidence that deployment of the first-generation ICBM system has been more limited than previously estimated, and that the bulk of the Soviet operational ICBM force over the next few years will consist of a newly developed second-generation missile with improved characteristics; which we estimate will be deployed in quantity beginning in 1962. There is now good evidence that Khrushchev and other Soviet leaders have intentionally misled the West concerning Soviet intercontinental attack capabilities in recent years, and that the USSR is only now beginning the buildup of a militarily significant ICBM force.

As a result of ORR's concentrated research effort on the production and deployment of Soviet long-range ballistic missile systems during the past four years, the Office was able to assess rapidly the intelligence implications of new information on Soviet missile strength, and to make major, and often unique, contributions to national intelligence in this field. Particularly noteworthy during 1961 were ORR contributions to two National Intelligence Estimates of Soviet strategic attack capabilities and to a special assessment for the Joint Chiefs of Staff projecting Soviet ICBM deployment to 1967. Other ORR support to the Office of National Estimates in the guided missile field included participation in Estimates of Soviet military strategy; the

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implications of disclosure of certain sensitive information on Soviet missile capabilities; and probable Soviet military reactions to certain U.S. courses of action with respect to the Berlin situation. In addition, a senior ORR missile specialist participated in a briefing of the President on Soviet ICBM capabilities and has provided continuing support to the Deputy Special Assistant to the President for National Security Affairs; the Office has provided increasing special support and guidance to disarmament planning and studies in which missiles play a leading part; and ORR personnel have contributed heavily to the activities of the Guided Missile and Astronautics Intelligence Committee (GMAIC) of USIB, including chairmanship of one GMAIC Working Group and Agency membership on a second. During the past year, ORR also continued to provide a high level of special guidance and support to both information collection and information processing organizations within the Agency and elsewhere in an effort to insure that no opportunity to develop additional means of acquiring information on Soviet missile programs is overlooked.

As our information base improves, the research effort of ORR in the field of guided missile production and deployment is being oriented increasingly toward more advanced long-run analysis of Soviet capabilities. Particular emphasis is focused on the following problems: (a) devising more effective means

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of estimating Soviet long-range missile strength beyond the relatively short time period covered by current firm evidence; (b) determining the operational effectiveness and capabilities of those missile systems now known to be deployed, or about to be deployed, in strength; and (c) improving our understanding of the fundamental military-economic factors which affect Soviet military policy and advanced weapons system programs. This research is essential to enable the Office to meet the inevitably increasing demands for national intelligence support which will result from the continued rapid growth of Soviet offensive and defensive missile capabilities.

In other military end product industries, our economic intelligence activities are largely centered around the Soviet bomber and transport, and submarine manufacturing industries. In the aircraft industry we see the continued shift from the production of bomber to transport type aircraft. In the submarine manufacturing industry we note a continued development in the production of many different types of submarines, some of which are nuclear propelled and missile equipped.

During 1961 ORR continued to study the availability of key inputs into the Soviet atomic energy program and the cost of that program to the Soviet economy. Closely related to these studies has been research on the growing capacity for

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generating and transmitting electric power and the patterns of consumption of electric power by traditional consumers, as well as by the nuclear energy program. Significant developments in the electric power industry in 1961 have included the initial operation of the Bratsk Hydroelectric Powerplant, which upon its completion in 1963 will be the largest powerplant in the world -- with a final installed capacity of 4,500 megawatts-- and construction of parts of a projected 500 kilovolt electric power network in East Siberia.

In the field of military economic research, ORR continues, as a service of common concern, its role of costing the entire current Soviet military effort and of estimating the fiscal feasibility of possibile future Soviet military programs. ORR's mission-oriented basis for estimating and presenting Soviet military expenditures has become established, and it is now a regular complement to the preparation of such expenditures by object classification.

During the past year, Sino-Soviet Bloc countries have intensified their efforts to penetrate less developed areas of the Free World through expanded trade and economic aid programs. ORR, in turn, has had to devote an increasing proportion of its analytical resources to monitor and analyze developments in this field. In cooperation with the Department of State, ORR continues to provide the bulk of the intelligence

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on the Bloc economic offensive for the biweekly and semiannual studies published and disseminated through the Economic Intelligence Committee. Moreover, ORR has contributed substantially to national intelligence estimates on Free World countries which have been principal targets of this offensive, including Ghana, Brazil and a number of Arab countries. In support of intelligence operations, ORR has prepared analyses of Bloc relations with Egypt, Indonesia, India, and the Algerian rebel regime. The close alignment of Cuba with the Bloc has led ORR to establish a special branch to mount a sustained economic intelligence effort on that country.

As Bloc international economic activities increase in scope and complexity, ORR is being called on increasingly to provide interpretive analyses of these activities and evaluations of Bloc success in meeting its objectives, not only in penetrating underdeveloped area, but also in other programs for using international markets and trading relationships as weapons in the Cold War.

In addition to its comprehensive economic research, the Office of Research and Reports evaluates and interprets current economic developments. A special staff, working in close cooperation with the Office of Current Intelligence and support by appropriate ORR research components, prepares a constant flow of reports on these developments for inclusion

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in the Agency's and the community's output of current intelligence. The same mechanism is used in marshalling the full support of this Office behind the National Indications Center and the USIB Watch Committee.

While Soviet announcements and recent statistical publications in certain non-strategic fields have been of value in our analysis of the Soviet Bloc economies, the Office must continue its intensive analysis of fragmentary and often conflicting data obtained overtly and covertly from innumerable sources. The complexity of the job and the need for an integrated approach mean that the economist, the technical expert, and the area specialist, all with their individual skills, are vital elements of the research team. Experience has shown that additional training oriented toward specialized intelligence research tasks, although expensive and time consuming, is necessary for most of those who become effective intelligence officers in the research teams of the Office.

In addition to the refinement of techniques of analysis to maximize the use of the factual information which is constantly flowing into the Office, we have intensified our program of collection guidance, stressing those areas where information needs are critical.

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The economic research area periodically calls upon a small number of cleared consultants [redacted] 25X1

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with us individually or as panels, the Office obtains an excellent independent check on the soundness of our estimates and advice on ways to simplify or economize in our research procedures.

The annual economic research program of the Office, aimed as it is at serving a number of different interests and purposes, is necessarily complex and broad in scope. Past experience is depended on heavily in the development of new programs. Over-all guidance is given by the Priority National Intelligence Objectives and by such advice as our principal consumers are able to provide concerning their requirements in the months to come. Formulation of the program begins with provision for support to the production of scheduled and anticipated National Intelligence Estimates. Provision must also be made for scheduled contributions to the National Intelligence Surveys, where the Office has responsibility for the economic sections of the NIS dealing with the Sino-Soviet Bloc. Similarly, certain aspects of ORR's work in support of other agencies are scheduled in response to community-wide deficiencies in economic intelligence as

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identified by the Economic Intelligence Committee. In addition, this Office is aware from experience that a substantial portion of our research time will have to be spent in meeting "crash" or emergency requests from various high-level consumers. Finally, ORR in its research planning includes projects which will examine economic questions likely to become of national intelligence significance in the future.

It is in this manner that the Office of Research and Reports meets its responsibilities for providing the necessary intelligence on economic activities and trends of the countries within the Sino-Soviet Bloc.

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Geographic Intelligence

We maintain within our Office of Research and Reports a group of competent geographic analysts who provide research and technical s ıpport to all parts of the intelligence community and contribute substantially to the National Intelligence Survey Program.

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A major part of this geographic work is in the form of geographic intelligence reports and maps

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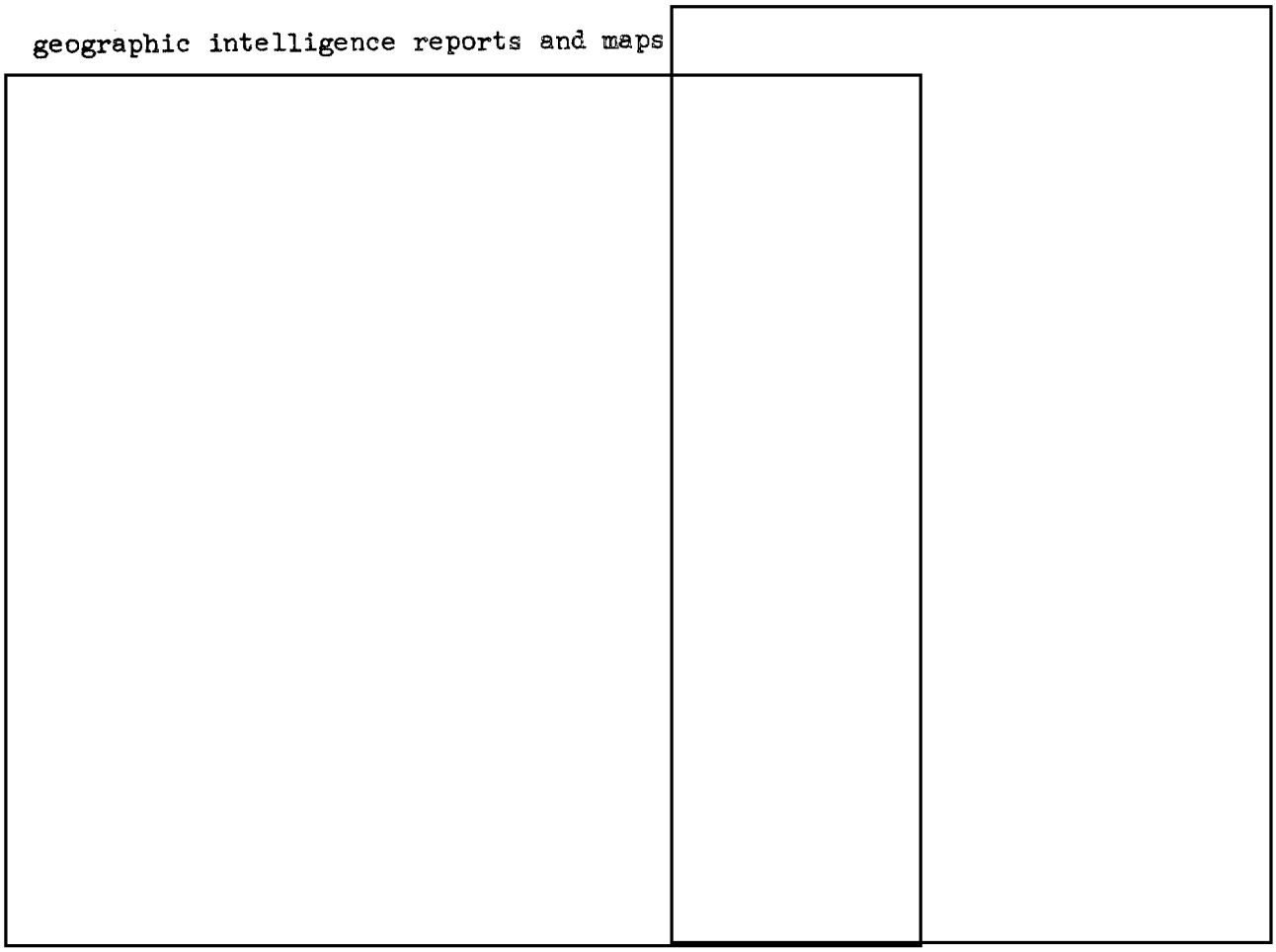

to analyses of foreign political crises affecting security interests of the United States. For example, during the past

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year briefing studies were prepared on Angola, Rhodesia and Nyasaland, West New Guinea, and the conditions of conflict in Laos and South Vietnam. Other more detailed studies have contributed to evaluation of Soviet or European Satellite capabilities in nuclear energy, guided missiles, and biological warfare, and to identification of similar Chinese Communist activities. We continue to devote increased attention to the geography of non-Bloc areas of the world, with particular emphasis on ethnic groups, local economies, and territorial conflicts that may be involved in future crises. For example, three studies were focused on politico-ethnic groups in the Republic of the Congo.

Since the inception of the National Intelligence Surveys Program, the geographic group has provided substantial and continuing intelligence and cartographic support to this important intelligence activity.

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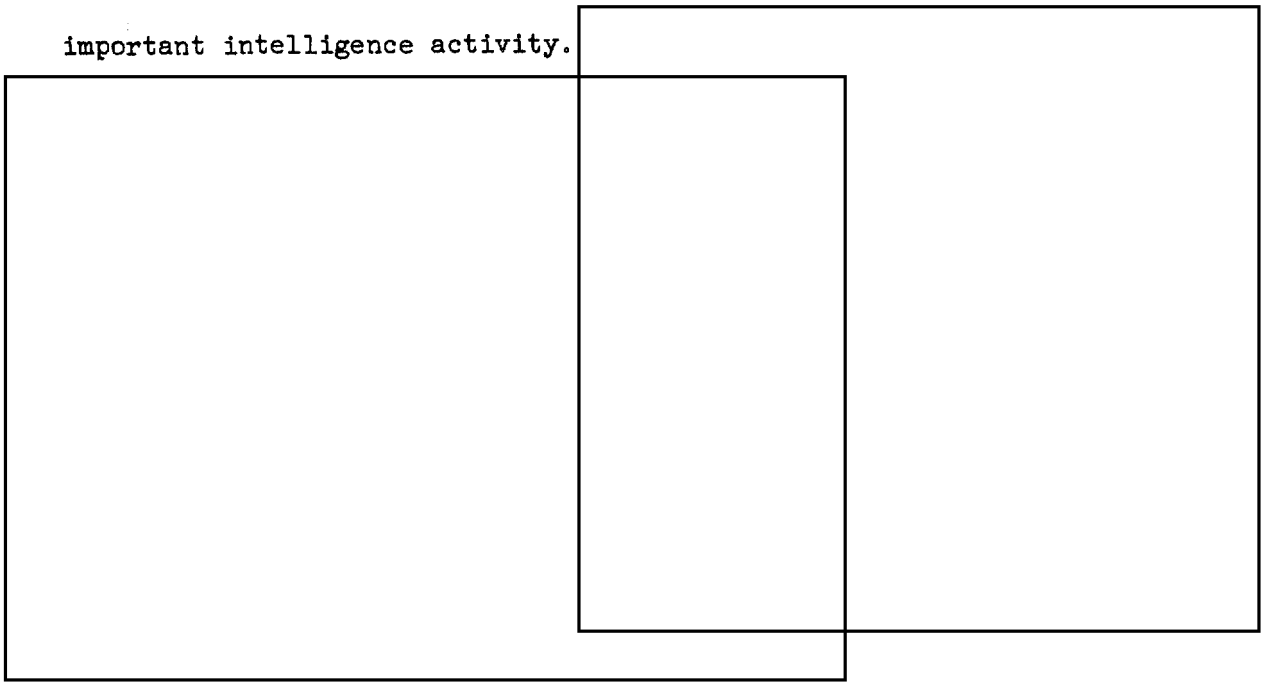

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data and ideas on areas of developing significance, our geographers have established intelligence discussion groups on Africa (interagency), Southeast Asia, and the Soviet Arctic.

During the past year, a number of geographic intelligence reports and briefings were prepared on USSR operations in Antarctica and the Soviet Arctic, for use in assessing the significance of Soviet achievements and long-range intentions as they affect United States interests in the Polar regions. In this work, we are closely supporting the Department of State through its working group on Antarctic policy planning. This support, for example, was of considerable value in the implementation of the first systematic U.S. mapping program in Antarctica. Moreover, this Office is currently providing intelligence assistance to the Department of State in connection with the implementation of the inspection provisions of the Antarctic Treaty.

In association with the Office of Scientific Intelligence and the Armed Services, we are intensifying our research on Soviet geodetic activities conducted within the USSR and abroad, and in outer space. Through this research, the community is better able to evaluate Soviet progress in geodetic positioning for long-range targeting purposes.

Effective representation of intelligence information requires extensive use of current up-to-date maps and charts. The Cartography unit in the Office plans and constructs maps

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and graphics for inclusion in intelligence reports

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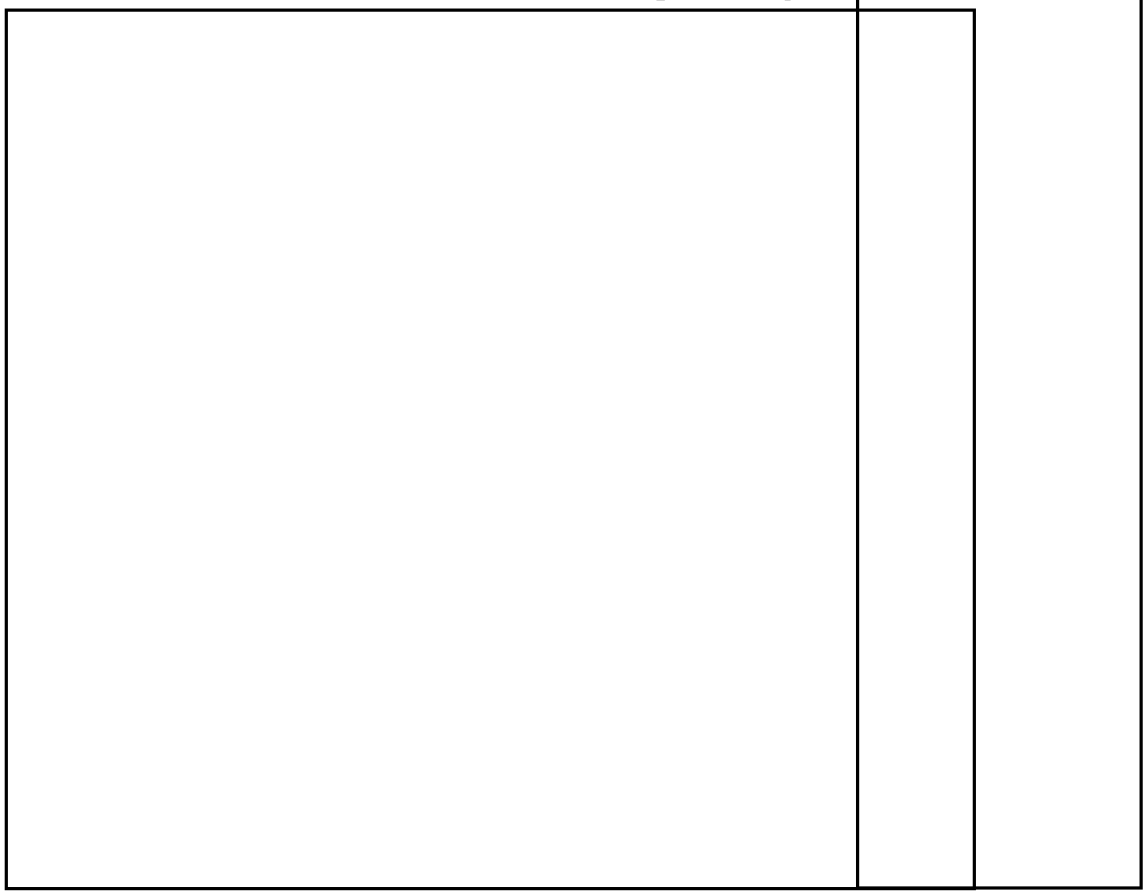

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Interagency Coordination

In carrying out CIA's responsibilities for coordinating economic intelligence relating to national security the Office of Research and Reports plays an active role in the work of the Interagency Economic Intelligence Committee (EIC) established in 1951 under CIA chairmanship. The membership of this committee is made up of the USIB agencies with the exception of the FBI and the AEC. In addition, a number of non-USIB agencies are associate members, including the Departments of Agriculture, Commerce and Interior and the Agency for International Development. The Office of Research and Reports provides secretariat services for the main committee and for all sub-committees and working groups.

As one of its principal responsibilities the EIC produces or arranges for the production of agreed interagency reports on selected economic intelligence matters of major importance. Biweekly and semi-annual summary reports on the Sino-Soviet Bloc economic offensive in the less developed areas of the Free World are produced and distributed throughout the U.S. Government to key officials and offices, including principal overseas posts.

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[redacted] These EIC reports were further expanded in 1961 in order to place foreign economic operations of the Bloc more in the context of the Bloc's broader interests in underdeveloped countries and to place more emphasis on Bloc military aid programs in non-Bloc countries.

A number of other studies of interest to policy makers were produced, including:

a) A supplement to an EIC report prepared in 1960 on the vulnerability of the East German economy to Western countermeasures (requested by USIB);

b) An analysis of the strategic impact on the Sino-Soviet Bloc of international embargo controls (prepared in collaboration with the Working Group of the Economic Defense Advisory Committee);

c) A contribution to the SIC Study on Soviet Science and Technology; and

d) An annual summary on the international trade and transport of Communist China.

As one of its major responsibilities the EIC reviews systematically economic intelligence activities throughout the U.S. Government to assist in identifying priority deficiencies in research and collection. As a means of reducing unnecessary overlap and duplication several of the EIC subcommittees have discussed the research plans of member agencies and have reviewed

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and coordinated studies produced by these agencies prior to publication. Further, the EIC annually reports the status of economic intelligence studies and related research (undertaken both within the Government and under external contract) which is concerned with Sino-Soviet Bloc and with Free World underdeveloped areas involved in Bloc economic penetration efforts. Proposals for external economic research contracts [redacted] are reviewed by the EIC, and comments and suggestions are forwarded to the sponsoring agencies for their guidance. Through the EIC mechanism, the Office of Research and Reports, as the organization primarily responsible for providing intelligence on the economies of the countries of the Sino-Soviet Bloc, obtains guidance in the continuing re-examination of its own research program.

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ORR also plays an active role in support of the US economic defense program. This Office represents the Agency on the Economic Defense Advisory Committee (EDAC) and the Advisory Committee on Export Policy (ACEP) and on their several subordinate groups.

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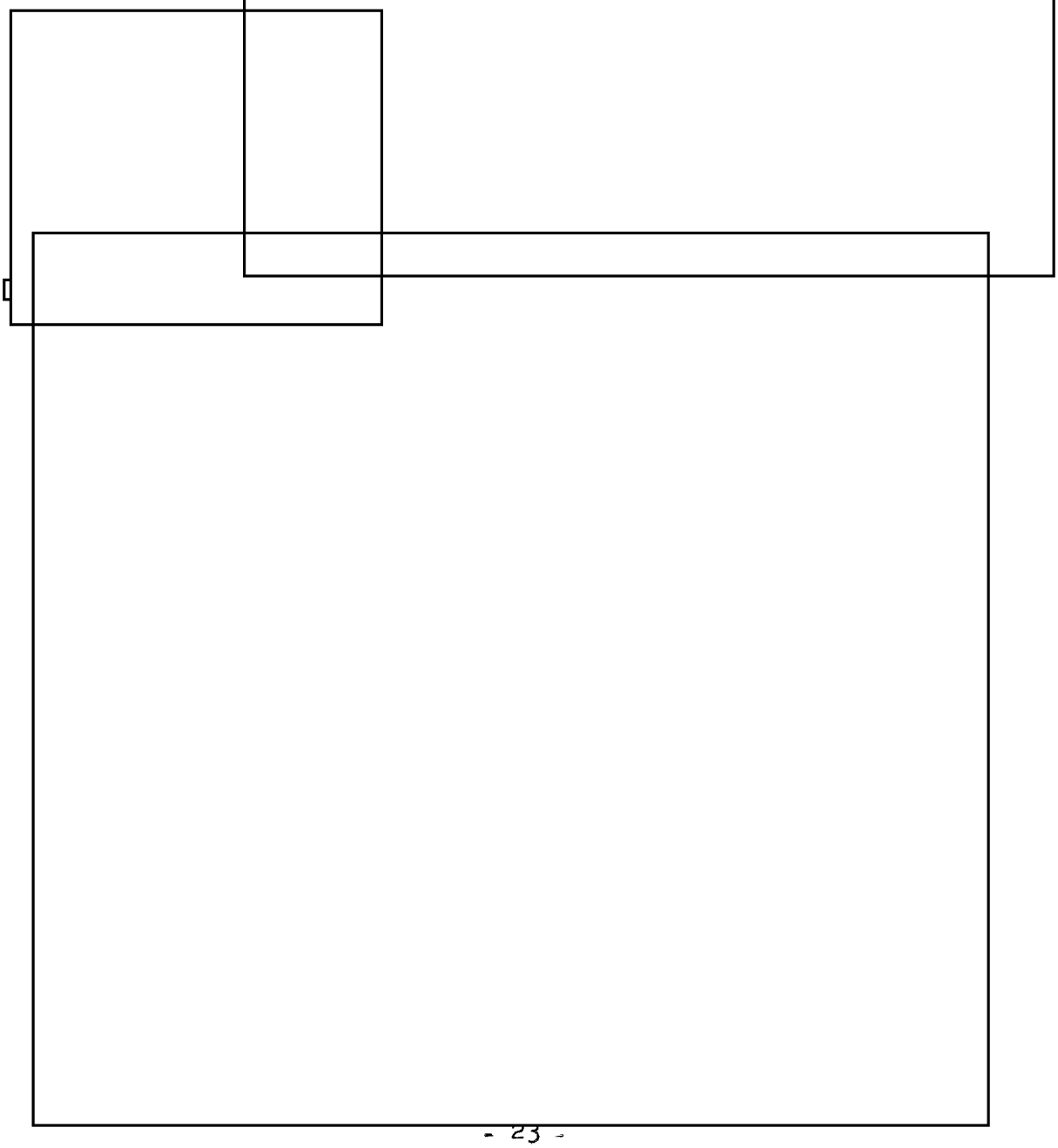

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Tab A

Statistical Summary of ORR Production
and Related Activities,
Including Coordinated EIC Reports and Surveys
1 January - 31 December ~~1961~~ 1962

TABLE 1
Reports and Contributions Issued

Category		Total
verified by St/PR	Economic Intelligence Report	~~64~~ 59
	Economic Intelligence Memorandum	~~32~~ 29
	Economic Research Aid	~~12~~ 8
	Economic Support Project	~~87~~ 85
	Current Support Brief	~~72~~ 115 ~~267~~ 296
verified by St/CS Division	Contributions to Current Intelligence Weekly	~~141~~ 135 ~~141~~ 135
	Contributions to Central Intelligence Bulletin	~~152~~ 195 ~~152~~ 195
	Contributions to Current Intelligence Digest	~~216~~ 139 ~~216~~ 139
verified by St/PR	[redacted]	25X1
verified by D/GG Division	Geographic Intelligence Memorandum	~~4~~ 10
	Geographic Support Project	~~201~~ 377 ~~214~~ 392
	Geographic Research Aid	2
verified by St/PR D/GG	NIS Sections (Economic)	~~18~~ 19
	NIS Sections (Geographic)	~~39~~ 35 ~~57~~ 54
	~~Contributions to NIS Annuals (Geographic)~~	~~2~~ ~~2~~
verified by EIC/S Brady	EIC Report	~~5~~ 3
	EIC Survey	~~6~~ 1
	EIC Working Group Report	~~26~~ 26
	EIC Subcommittee Report	~~1~~ 2
	EIC Subcommittee Working Paper	~~1~~ 1
	Index to EIC-WGR Series	~~1~~ 1
	~~EIC Project~~	~~1~~ ~~41~~ 34
verified by St/FM Division	[redacted]	
	GRAND TOTAL	25X1B4D ~~1,151~~ 1,309

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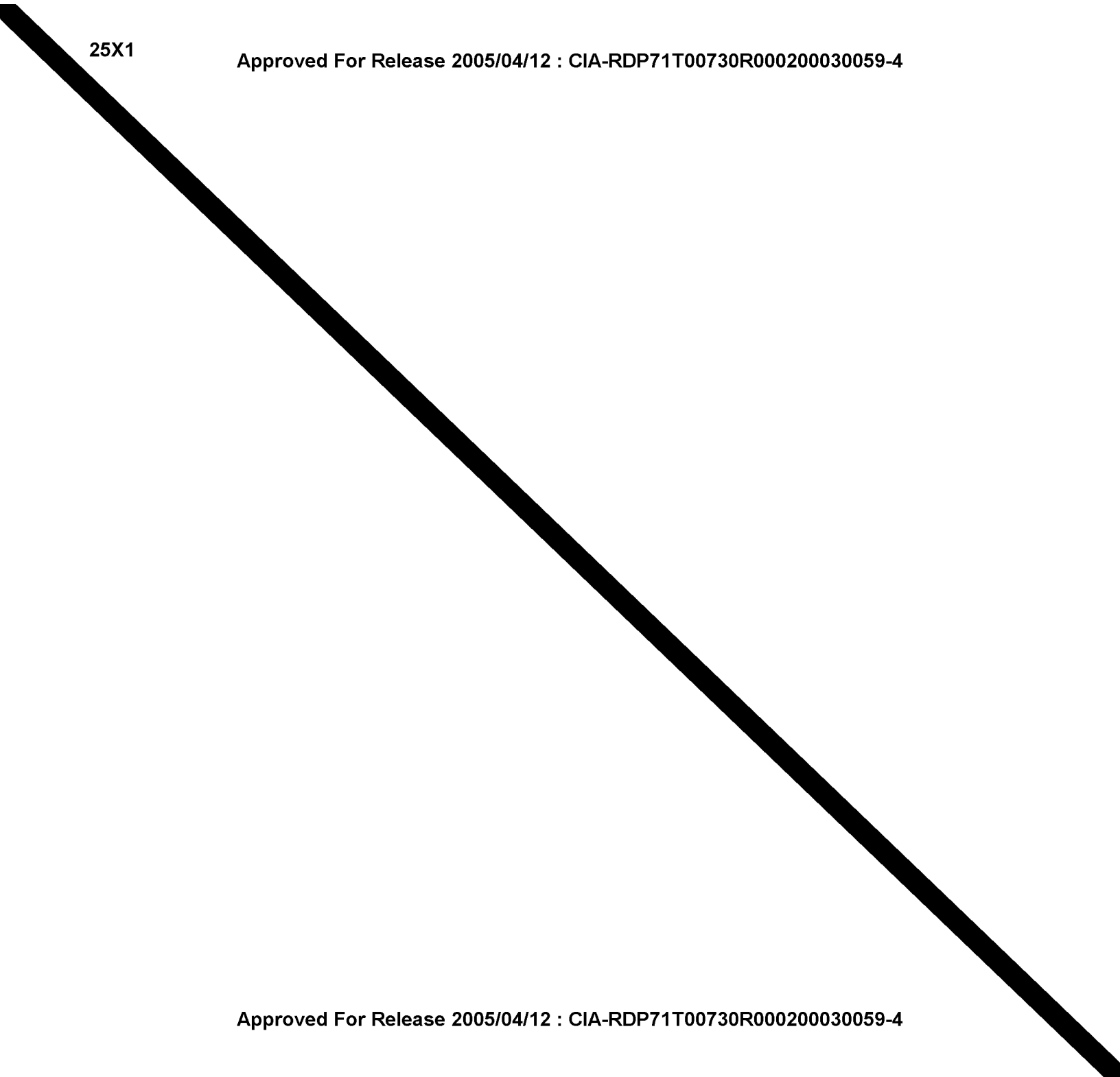

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TABLE 2
Maps and Charts Completed

Maps	1,332
Charts	408
TOTAL	1,740

TABLE 3
Projects in Progress

	Economic	Geographic	EIC
In Reproduction	13 ~~18~~	-	~~1~~
Editorial Review	1 3	2	~~1~~
In Preparation for Reproduction	4 5	1	-
Projects Scheduled:			
Research in Progress	305	73	4
Research Pending	-	100*	1
TOTALS	323	176	6

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TABLE 4
Maps and Charts in Progress

	Maps	Charts
In Reproduction	48	23
In Proof	95	16
In Progress	281	43
TOTALS	424	82

*Exclusive of the Collation Project Program, which is subject to considerable variation. Research units pending are estimated to be 1,200.

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